

PROJECT OBJECTIVES, GOALS, AND IMPLEMENTATION (POGI)

FY 2014 Professional Fellows Program Congresses

Funding Opportunity Number ECA-ECAPEC-14-040

Office of Citizen Exchanges, Professional Fellows Division

The POGI guidelines apply specifically to the Request for Grant Proposals (RFGP) issued by Professional Fellows Division of the Office of Citizen Exchanges of the Bureau of Educational and Cultural Affairs (ECA/PE/C) for the FY 2014 Professional Fellows Program Congresses. Proposals must conform to the RFGP, the Guidelines stated in this document, and the standard Proposal Submission Instructions (PSI). Applications not adhering to the conditions set forth herein may be deemed technically ineligible. These guidelines are specific to the program mentioned above and are IN ADDITION TO the Standard Guidelines outlined in the PSI. If there is a perceived disparity between the standard and program specific Guidelines and the program information supplied in the accompanying RFGP, the RFGP is to be the dominant reference.

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The Bureau of Educational and Cultural Affairs Office of Citizen Exchanges (ECA/PE/C) expects to award a cooperative agreement for the administration of two three-day Professional Fellows Program End-of-Program

symposiums or “Professional Fellows Congresses” to be held in Washington, DC, in the spring and fall of 2015. The Professional Fellows Program is a public diplomacy program developed to engage civil society and government leaders from eligible countries, who are approximately 25 – 40 years of age, and to provide them with knowledge of U.S. practices and techniques in their field of expertise, explore governance principles and practices in both public and civil society institutions in the U.S., and gain a deeper understanding of U.S. society, culture, and people. The Professional Fellows Program is also designed to provide U.S. participants the opportunity to share their professional expertise with counterparts in eligible countries and gain a deeper understanding of the societies, cultures, and professional arena of their foreign counterparts. Professional Fellows will undertake a four- to six-week fellowship program in public and government offices, legislatures or non-profit organizations working with seasoned leaders on pre-defined substantive issues of mutual interest.

The Professional Fellows Congresses, which will occur at the end of spring and fall fellowship component, should build upon the fellowship themes described in the RFGP, work to reinforce programmatic goals, allow for engaged interaction between Fellows from difference programs, highlight key learning objectives, and outline plans for follow-on projects.

The Professional Fellows Congresses are designed to provide Fellows:

- the opportunity to network with colleagues from around the world, share their U.S. experiences, and learn from the experiences of other Professional Fellows;
- a contextual framework for the broader fellowship experience and exchange program;
- an opportunity to examine ways an individual, organization, or interest group can generate change for the common good; and
- a greater understanding of public diplomacy in the global community.

The award recipient will work in close cooperation with the Office of Citizen Exchanges to coordinate this event. Effective management of these two high-profile Professional Fellows Congresses is essential to the overall success of the FY 2014 Professional Fellows Program.

I. STATEMENT OF WORK

A. Recipient Responsibilities

For the administration of the FY 2014 Professional Fellows Congresses, the award recipient should, as appropriate, utilize the latest in technology and social media to:

1. Design and implement a comprehensive plan for management and coordination of logistics for the spring (tentatively June 3-5, 2015) and fall (tentatively November 4-6, 2015) Congresses. Each Professional Fellows Congress will include approximately 180-220 Professional Fellows, in addition to staff from approximately 12-16 participating organizations. This will include but is not limited to identifying speakers, setting up meetings in the Washington, DC area, providing transportation between the conference facility and the State Department as needed, lodging, per diem, working lunches, reception and miscellaneous expenses for all Fellows for a minimum of three days;
2. Develop a communication plan and strategy that allows for timely communication, data collection, and dissemination of information among all the key conference stakeholders;
3. Develop, update, and share a central planning calendar with corresponding timelines and benchmarks with participating organizations and ECA staff;

4. Develop a conference database to maintain key data including but not limited to program participants, grantee staff, guest reservations, State Department invitees, volunteers, speakers, and moderators;
5. Develop content and conference related activities including but not limited to designing and planning activities that provide a substantive agenda focused on the main Professional themes and overall conference objectives, identifying appropriate academic and professional speakers, moderators, and panelists, and identifying informal events to help foster professional relationships among and between Fellows from the participating countries;
6. Coordinate with the Office of Citizen Exchanges, Professional Fellows Division to secure State Department officials to speak at the Congress;
7. Develop and produce high quality conference materials including electronic and hard copies of the program agenda for all participants and involved parties, appropriate signage, name cards, registration lists, and related materials. Final copies of the conference agenda should be bound and printed in color;
8. Develop participant capacity: In coordination with grantees, include a plan to prepare participants to transition back to their host communities in the United States and provide them with ideas and strategies they can apply in their home countries when they return at the end of their exchange. This includes developing and distributing materials that will be useful in promoting the goals of the program and may include sending relevant materials to participants in advance of the workshop;
9. Coordinate staff volunteers to manage the overall conference proceedings; determining volunteer requirements, assigning, orienting and supervising. Volunteers may include staff from the participating organizations and ECA.
10. Prepare Fellows for engaged participation at the Congresses, answering their questions on conference issues, including, but not limited to, travel to the hotel, conference schedules, per diem, D.C. based activities;
11. Provide emergency services, as needed (participants will be covered by health insurance through policies with their placement organizations);
12. Provide timely progress, financial, and program reports to ECA.
13. Provide fiscal management of all accounting and contractual relations and promptly report any irregularities in the budget or spending to ECA; and,
14. Evaluate the Professional Fellows Congresses and its effectiveness in achieving stated program goals and impact on the participants.

B. U.S. Department of State Responsibilities

ECA activities and responsibilities for this program include:

1. Participation in the design and direction of conference-related activities including the development of the conference agenda, speaker selection, and networking activities;
2. Participation in collaborative teleconference or other communications means utilized in coordinating information sharing and dissemination of information amongst all grantee recipients;
3. Approval of key personnel;
4. Input and approval on program timelines and agenda;
5. Providing guidance in execution of all program components;
6. Review and approval of all program publicity and other materials;
7. Approval of conference facilities and location for reception and other social events;
8. Assistance with participant emergencies;
9. Liaison with relevant U.S. Embassies and country desk officers at the State Department particularly in terms of ECA speaker and staff participation; and,

10. Working with the award recipient to publicize the program through various media outlets.
11. Performing an annual performance evaluation/review. Satisfactory performance and the availability of funds is a condition of continued administration of the program and execution of all option years.

II. PROGRAM SPECIFIC GUIDELINES

Overview:

The proposal should discuss the goals and objectives of the Professional Fellows Congress, propose possible conference themes and topics as well as ways to highlight the program using social media and other outreach methods for all aspects of conference planning and implementation. Proposals should also include a detailed draft agenda along with a separate and detailed plan for the utilization of the alumni website. Special attention should be given to an examination of how the Professional Fellows will translate and utilize their U.S. experiences in their home communities.

Online collaboration and leadership training:

The proposal should include a section focused on means of engagement with all of the foreign participants upon their arrival in the U.S. through an appropriate online forum. The purpose of this is for the participants to begin to interact with one another, prior to arriving at the closing Professional Fellows Congress. In addition, the proposal should include the provision of an online leadership training module for the foreign participants to take part in during their working placements portion of the Professional Fellows Program.

Program Agenda and Materials:

The agenda, where possible, should utilize adult learning styles and incorporate a wide range of academic or professional speakers, interactive seminars, practical experiences, in addition to including other hands-on opportunities for Fellows to deepen their understanding of U.S. practices and techniques in their field of expertise, share key insights from their Fellowship experience, and develop a community of dialogue and collaboration. Cultural and recreational activities should provide informal (and enjoyable) opportunities for networking among participating Fellows. The award recipient will conduct a registration period and welcome session for the participants upon arrival in the National Capital Area to introduce participants to one another, the program, and to establish expectations for the Congress.

During the Congress, the agenda should be structured to maximize the amount of time that the Fellows are divided into smaller groups for programmatic roundtables, workshops, and/or breakout sessions. The remaining time will be plenary sessions including the opening, a keynote speaker, participant presentations, and the closing session. Specific time should be allotted for Fellows to meet with representation from the State Department's geographic regional bureaus as well as with their administrating grantee organization. The agenda should include time devoted to the American outbound portion of the exchange, possibly to include participation by past or current American participants.

To achieve these objectives, the award recipient must coordinate efforts with the Office of Citizen Exchanges and the 12-16 grantee organizations to develop a conference agenda that is responsive to ECA and program goals. This includes arrange meetings, phone calls, or other mechanism for timely communication and conference decision-making.

Communication:

The award recipient shall promote the use of a suitable technological platform as a base of communication among the Professional Fellows, grantee organizations, and State Department staff. The award recipient shall work closely with the Office of Citizen Exchanges, participating grantee organizations, and Alumni website staff to creatively utilize technology and platforms in a manner so that participants are fully engaged with one another and with the State Department and grantee organization staff from the time they are selected to the end of the program, and beyond. The award recipient will be responsible for working with ECA and grantee staff to develop substantive online content to elicit comments on specific themes relevant to the program and participant experience. The award recipient shall also be involved in the overall effort to encourage program participants to share and post photos and programmatic highlights that can be used in the State Department outreach and media reporting.

Arrival and Departure from Washington, DC:

The award recipient shall be responsible for compiling relevant information on the arrival and departure of all program participants in Washington, DC. The participating grantee organizations will be responsible for arranging transportation for program participants to and from the airport on the day of their arrival and the day of their departure. The award recipient should provide participating grantee organizations with hotel information and logistical information about their stay in Washington, D.C. at least three weeks in advance of the Fellows arrival.

Ground Transportation:

During the three-day Congress, the award recipient shall arrange and pay for ground transportation, as necessary, in Washington, DC for all of the incoming Professional Fellows, participating grantee organizations, and/or State Department staff participating in the Professional Fellows Congress (approximately 250 total individuals per Congress, including 180-220 program participants, plus additional grantee organization representatives and alumni). Should the Grantee organization chose to use any conference facilities in a different location than the hotel, the Grantee is responsible for arranging busses to pick up the Fellows every morning and return them in the evening. Additionally, buses should be available to transport congress attendees to any off-site conference activities throughout the Washington, DC metropolitan area. The award recipient is expected to consult with the Office of Citizen Exchanges about specific dates and travel itineraries for Congress participants.

Conference Facility:

The award recipient shall secure appropriate conference room facilities at a conference hotel or other conveniently located facilities in the Washington DC area. The award recipient is responsible for covering the cost of the hotel or other conference facilities and providing timely communication to participating grantee organizations and participants on the conference venue. When choosing workshops sites, the Bureau encourages applicants to consider proximity to sites of historical or cultural interest, access to Department of State representatives, and that showcase the geographic and ethnic diversity of the National Capital Area.

Lodging:

The award recipient shall reserve a block of double-occupancy rooms at an appropriate Washington, DC hotel for all of the Professional Fellows, 1-2 grantee staff from participating organizations, and selected alumni (approximately 100-125 rooms per Congress). The award recipient will cover all costs associated with the housing of Fellows as well as accompanying staff members from the participating organizations. The award recipient should work with ECA to determine the appropriate number of participating staff members from the grantee organizations.

Meals:

The award recipient will be responsible for organizing and paying for the following events:

1. The award recipient organization will work with the conference facility to arrange for breakfast and lunch for Professional Fellows, participating grantee organizations, and State Department Staff. These costs should be in keeping with the federal per diem rates (<http://www.gsa.gov/portal/category/21287>)
2. The award recipient shall make arrangements with a caterer for a reception to be provided at the State Department in the Diplomatic Reception rooms for both the Spring and Fall Professional Congresses, or an acceptable alternative venue. This reception should include food and beverages for approximately 250 - 300 participants, grantee organizations, ECA staff, and invited guests. In close coordination with State Department staff, the award recipient shall arrange logistics of this reception including seating arrangements, vegetarian options, and the like. The award recipient will be responsible for paying the selected vendor. Alternatively, the award recipient could provide a buffet style working meal in place of or in combination with a reception format.
3. The award recipient shall make arrangements with a caterer for one working meal/reception to be provided at a venue outside of the State Department such as a closing banquet or dinner. This meal should include food and beverages for approximately 250-300 people. The Award recipient shall work with the Office of Citizen Exchanges and participating grantee staff to manage the logistics of this working meal/reception, including signage, podium and audiovisual equipment, and the like.
4. The award recipient shall make arrangements for the provision of beverage service (coffee/tea/juice/water) for the morning and afternoon breaks during the Professional Fellows Congress. This service should provide for approximately 250 people.

Post-event Follow-up and Reporting: The award recipient shall facilitate post-event evaluation in order to determine how future Professional Fellows Congresses could be improved. The award recipient should provide the Office of Citizen Exchanges a detailed report outlining lessons learned and recommended changes to the Congress format. The report should include statistical results of the Professional Fellows Congress surveys or evaluations. Special attention should be paid to effectiveness of the Alumni website as a vehicle for logistical and programmatic issues, as well as communication and resource sharing. The results should be presented as percentages of respondents answering a question in a particular way, as well as the actual number of respondents (i.e. 11 out of 14 respondents answered “yes”).

Note: All printed materials and formal communications (written or oral) should acknowledge the role of the U.S. Department of State’s Bureau of Educational and Cultural Affairs. Drafts of printed materials developed for this program should be submitted to the Office of Citizen Exchange for review and distribution. Copies of materials given to and prepared by the Fellows should be provided to the ECA program officer in a timely fashion.

III. SECTION THREE – PROPOSAL CONTENTS

Applicants should submit a complete and thorough proposal describing the program in a convincing and comprehensive manner. Since there is no opportunity for applicants to meet with reviewing officials, the

proposal should respond to the criteria set forth in the solicitation and other guidelines as clearly as possible.

Proposals should address succinctly, but completely, the elements described below and must follow all format requirements.

NOTE: Proposals submitted through Grants.gov may only be submitted in the following formats:

- Microsoft Word
- Microsoft Excel
- Adobe Portable Document Format (PDF)
- ASCII Text
- Joint Photographic Experts Group (JPEG images)

Proposals should include the following items under the section headings in the GrantSolutions Application Checklist:

Online Forms

SF-424, "Application for Federal Assistance"

SF-424A, Budget Information – Non-Construction Programs

SF-424B, "Assurances – Non-Construction Programs"

Include other attachments, if applicable, such as indirect agreements, form 990, SF-LLL, etc.

Proposals should include the following items under the section headings in the GrantSolutions Application Checklist:

Program Narrative

Executive Summary (One page)

In one double-spaced page, provide the following information about the project:

1. Name of organization/participating institutions
2. Beginning and ending dates of the program
3. Proposed theme
4. Nature of activity
5. Funding level requested from the Bureau, total program cost, total cost-sharing from applicant and other sources
6. Scope and Goals
 - a. Number and description of participants
 - b. Wider audience benefiting from program (overall impact)
 - c. Geographic diversity of program, both U.S. and overseas
 - d. Fields covered
 - e. Anticipated results (short and long-term)

Narrative

In 20 double-spaced, single-sided pages, provide a detailed description of the project addressing the areas listed below.

1. Vision (statement of need, objectives, goals, benefits)
2. Participating Organizations, if applicable

3. Program Activities
4. Program Evaluation
5. Projected Follow-on
6. Project Management
7. Work Plan/Time Frame

Additional Information to be Submitted

Detailed Budget:

Allowable Costs:

- 1) Symposium programming for approximately 500 Professional Fellows, participating grantee organizations, ECA staff, and program alumni
- 2) Honoraria for speakers
- 3) Lodging and hotel expenses including conference space and audio-visual support
- 4) Food including working meals (reception and final banquet)
- 5) Enhancement and cultural programming
- 6) Ground transportation in the Washington, D.C., area for participants, staff, and speakers
- 7) Educational Materials
- 8) Materials including printing and duplication of promotional pieces, Congress binders, participant bios, name tags, table tents, and other supporting Congress related items such as printing of participant photo submissions or production of materials for a participant poster show
- 9) Travel to and from Washington, DC, per diem and lodging for a small number of foreign and American alumni of the Professional Fellows Program to fully take part in each of the Professional Fellows Congresses
- 10) Staffing
- 11) General administrative expenses

Calendar of activities/itinerary

Letters of endorsement

Resumes

Resumes of all program staff should be included in the submission. No resume should exceed two pages.

Draft Program Agenda

Draft of Congress Related Materials and Outreach Documents, as appropriate

Draft Outline of Communication Strategy

Outline and Timeline of Online Activities

Sample Evaluation Instrument

First time applicant organizations and organizations which have not received an assistance award (grant or cooperative agreement) from the Bureau during the past three (3) years, must submit as an attachment to this form the following: (a) one copy of their Charter OR Articles of Incorporation; (b) a list of the current Board of Directors; and (c) current financial statements. Note: The Bureau retains the right to ask for additional documentation of those items included on this form. *TAB A - Application for Federal Assistance Cover Sheet (SF-424)*

3.) **Please note:** Effective January 7, 2009, all applicants for ECA federal assistance awards must include in their application the names of directors and/or senior executives (current officers, trustees, and key employees, regardless of amount of compensation). In fulfilling this requirement, applicants must submit information in one of the following ways:

- Those who file Internal Revenue Service Form 990, "Return of Organization Exempt From Income Tax," must include a copy of relevant portions of this form.
- Those who do not file IRS Form 990 must submit information above in the format of their choice.

As part of final program reporting requirements, award recipients will also be required to submit a one-page document, derived from their program reports, listing and describing their grant activities. For award recipients, the names of directors and/or senior executives (current officers, trustees, and key employees), as well as the one-page description of grant activities, will be transmitted by the State Department to OMB, along with other information required by the Federal Funding Accountability and Transparency Act (FFATA), and will be made available to the public by the Office of Management and Budget on its USASpending.gov website as part of ECA's FFATA reporting requirements.

Include other attachments, if applicable, i.e. the SF-LLL form, etc.

V. SECTION FIVE – REVIEW PROCESS

Eligible proposals will be subject to compliance with Federal and Bureau regulations and guidelines and forwarded to Bureau grant panels for advisory review. Proposals may also be reviewed by the Office of the Legal Adviser or by other Department elements. Final funding decisions are at the discretion of the Department of State's Assistant Secretary for Educational and Cultural Affairs. Final technical authority for assistance awards (grants or cooperative agreements) resides with the Bureau's Grants Officer. The Bureau reserves the right to reduce, revise, or increase proposal budgets in accordance with the needs of the program and availability of funds.

The submission will be reviewed with the following review criteria in mind:

1. *Quality of the program idea:* Proposals should exhibit originality, substance, precision, and relevance to the Bureau's mission.
2. *Program planning and ability to achieve objectives:* Detailed agenda, sample

materials, and relevant work plan should demonstrate organization's substantive undertakings and logistical capacity. Agenda and plan should adhere to the stated Professional Fellows Program overview and Congress guidelines described above. Proposals should clearly demonstrate how the institution or organization will meet the Professional Fellows Congress goals and objectives.

3. *Support of Diversity*: Proposals should demonstrate the institution's or organization's commitment to promoting the awareness and understanding of diversity in all aspects of the Professional Fellows Congress planning, development and implementation.

4. *Institutional Capacity and Track Record*: Proposed personnel and institutional resources should be adequate and appropriate to designing, developing, implementing, and managing a spring and fall capstone event for the Professional Fellows program. Proposals should demonstrate an institutional record of successful execution of large scale conference, workshop, or symposium type programming and related activities, including responsible fiscal management and full compliance with all reporting requirements for past Bureau awards.

5. *Multiplier effect/impact*: The proposed program should strengthen long-term mutual understanding, including maximum sharing of information and establishment of long-term institutional and individual linkages.

6. *Project Evaluation*: Proposals should include a plan to evaluate the activity's success, both as the activities unfold and at the end of the program. The Bureau recommends that the proposal include a draft survey questionnaire or other technique plus description of a methodology to use to link outcomes to original project objectives. Award-receiving organizations/institutions will be expected to submit intermediate reports after each project component is concluded or quarterly, whichever is less frequent.

7. *Cost-effectiveness*: The overhead and administrative components of the proposal, including salaries and honoraria, should be kept as low as possible. All other items should be necessary and appropriate.

APPLICATION SUBMISSION

The RFGP indicates the date the complete proposal is due and the manner in which proposals must be submitted. There are NO EXCEPTIONS to this deadline. For further information regarding this program or the competition, call Adam Meier at (202) 632-6067, ECA/PE/C/PF; email: meieraw2@state.gov.